

EQUINITI
TOPLEVEL



British Council and GMT

CASE STUDY



British Council's Grants Mobility Tool continues to deliver efficiency gains

Equiniti Toplevel has enabled the British Council to create a single online platform – the Grants Mobility Tool – over which national and international educational programmes can securely process applications for grants, scholarships and mobility placements.

The British Council has been using the Grants Mobility Tool, built on the Outreach platform, since 2015 during which time its versatility has allowed it to be used by 12 programmes to award over 500 grants and 9,500 scholarships and placements.



The Requirement

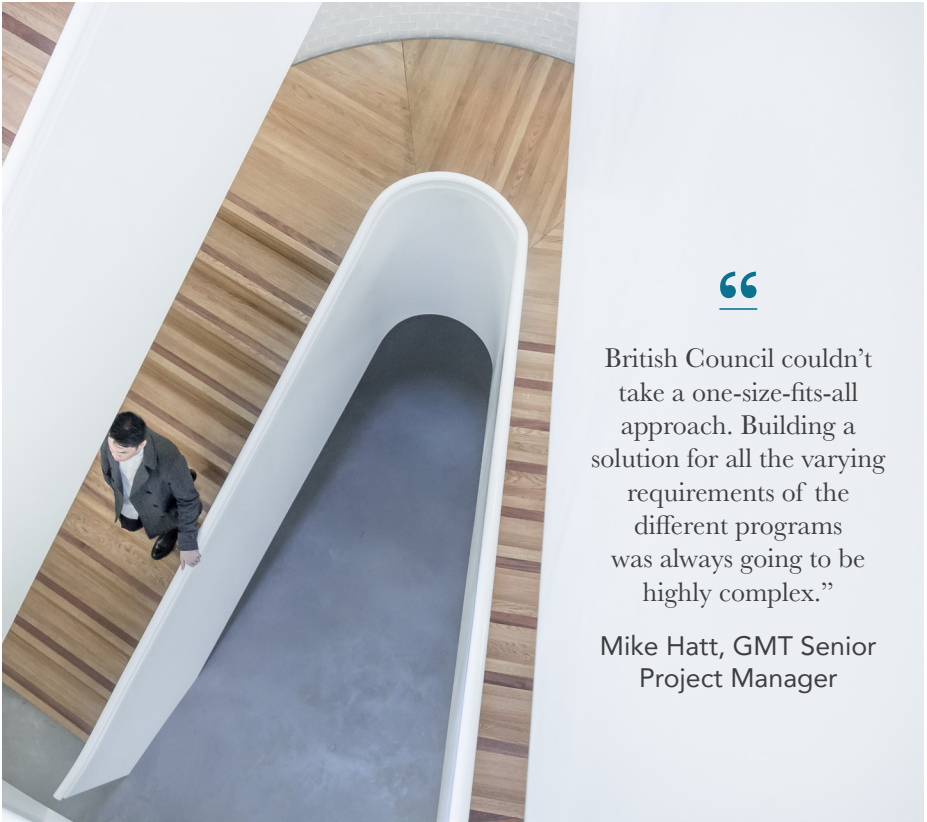
The British Council sought to bring together a variety of very different educational programmes, each with their own application processing requirements, over a single online system.

The organisation is the UK's international organisation for cultural and educational opportunities and works across more than 100 countries, reaching more than 75 million people directly. It coordinates numerous grant, scholarship and placement programmes, from arts and research grants through to education scholarships and teacher training. Grants have ranged from a few thousand pounds to over a million with each programme having its own distinct nuances when it came to assessing applications. This meant each programme had to use its own ad-hoc processes and systems which proved both costly and complex.

“

The way grants were awarded was very resource intensive, requiring a lot of staff to work across the different programmes. It was seen as a real disadvantage when it came to bidding for new programmes. So we wanted to move to an online platform that would enable paperless applications and assessments which would also give our clients and customers access to the data when and where they needed it.”

Mike Hatt, GMT Senior Project Manager



“

British Council couldn't take a one-size-fits-all approach. Building a solution for all the varying requirements of the different programs was always going to be highly complex.”

Mike Hatt, GMT Senior Project Manager

To remain competitive and continue to grow, the British Council wanted to automate its grants management and unify its systems and processes over a single platform. It sought a solution capable of providing the flexibility to accommodate the different needs and application processes of each programme while at the same time providing a secure centralised platform which would be made available online to all the relevant parties.

The British Council embarked on the procurement process back in 2015 when it selected Equiniti Toplevel to provide a Grant Mobility Tool (GMT) based on the Outreach case management platform. As a customisable, off-the-shelf offering, Outreach was a highly appealing solution. It could be adapted and rapidly deployed to meet the needs of the different programmes but to do so would require the platform to be flexible enough to accommodate the variety of processes involved. Despite the challenges involved, in 2016 the platform had completed a pilot phase and was being used by three mobility programmes and three grant programmes.

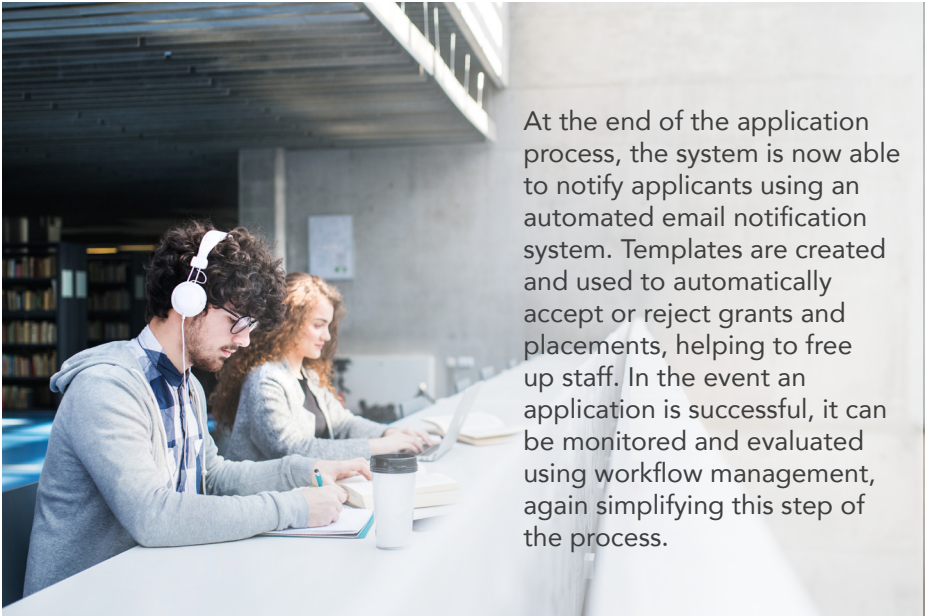


The test of time

Fast forward to 2019 and the GMT has continued to prove its versatility. The system has since been integrated with an online payments system to help process administration fees, helping to ensure the solution can support paid applications and continues to cut costs as the British Council no longer needs to generate invoices for all the programmes. While not part of the original scope, Equiniti Toplevel assisted in the project which took just eight weeks to complete.

The British Council manages the platform itself and has utilised a number of key features to further centralise processes and improve productivity. Mike Hatt, Senior Project Manager of the GMT, says perhaps one of the biggest advantages has been the ability to enforce eligibility criteria. This sees the system pre-screen applications by providing the applicant with a number of yes/no questions, helping to dramatically cut staff workloads.

Another major gain has been the ability to provide secure online access to the staff portal for external assessors which is available 24/7 on a global basis. Moreover, certain programmes require applications to be assigned to external assessors based on their expertise or area of research to assess the merits of the application and this has been made possible through role-based access which ensures the appropriate member of staff has access to the application at a given stage.



At the end of the application process, the system is now able to notify applicants using an automated email notification system. Templates are created and used to automatically accept or reject grants and placements, helping to free up staff. In the event an application is successful, it can be monitored and evaluated using workflow management, again simplifying this step of the process.

“

The online capability of the GMT has allowed us to outsource the assessment of our applications, reduced our need for storage and with a widely dispersed team, has improved the management and processing of our applications, as the whole team has the same access. The automated emails sent to our applicants has improved the customer journey, while the reports portal has greatly improved our ability to report on the programme and provide statistics, as well as ensure that all successful candidates are eligible.”

Stephanie Thomson,
Project Manager
(English Language Assistants)

“

GMT helps us manage the whole application process online, from the initial submission of candidates’ applications, to the eligibility checking of candidates and initial online assessment scoring. We can clearly break down the stages of the application and assessment process and the stages each candidate is at so that management reports can easily be downloaded and analysed and used in future decision making. It also acts as a very useful database where all the details for each candidate and scholar can be stored and accessed easily.”

Sarah Kinsey, Project Manager
(Language Teacher Training
Scholarships)

Benefits

Since deployment the GMT has been used by 12 programmes, resulting in over 500 grants and 9,500 scholarships and placements - and a further two programmes are set to be added this year. All of the programmes have benefited from using a shared infrastructure with shared support costs, and those that have been on the platform for some time report significant gains in processing times.

The English Language Assistants Programme found that the time spent by staff on processing an application fell by 42 percent since moving onto the GMT, and the programme was able to outsource the initial application stage to help reduce costs. Similarly, the IAESTE programme found the time spent by staff on the initial set-up and monitoring of an application form was reduced by 21 percent compared to before it came onto the GMT platform.

Programmes using the GMT today

- Connecting Classrooms through Global Learning
- Developing Inclusive and Creative Economies (DICE)
- IAESTE placements for UK students
- Teaching abroad as an English Language Assistant
- Modern Language Assistants
- Language Teacher Training Scholarships (LTTS)
- Newton Fund (Researcher Links)
- Study USA
- UK-India Education and Research Initiative (UKIERI)

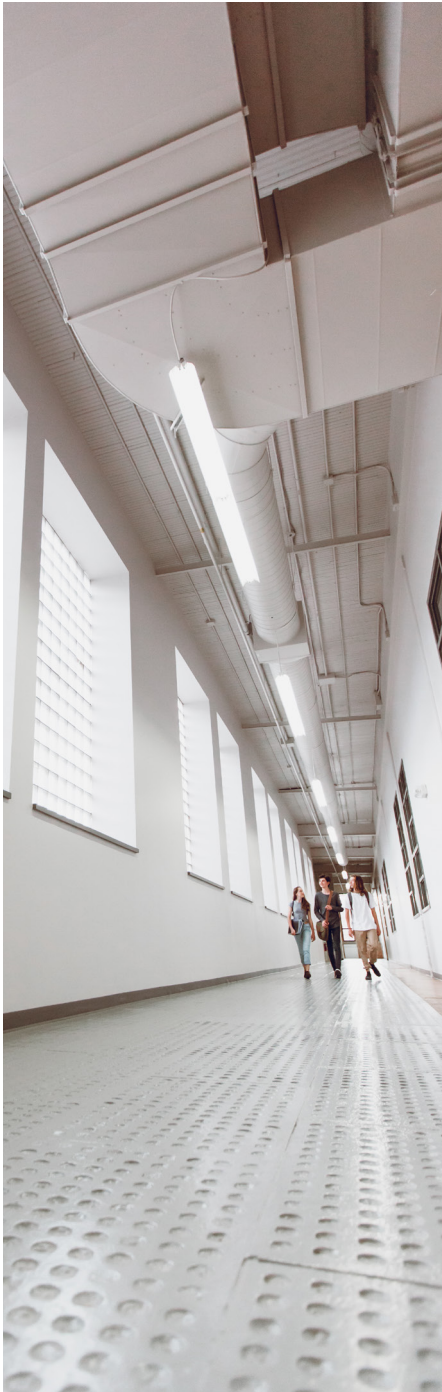




The British Council also regularly conducts satisfaction surveys to determine how users – from the 59,000 external user accounts to 350 members of staff – interact with the system. Applicants, staff and external assessors are sent an annual survey and the results are used to further improve the platform.

The latest survey revealed that over 90 percent of applicants found it easy to set up an account and regarded the portal as easy to navigate, while 82 percent found the application process simple to complete. When it came to external assessors, over 90 percent found it easy to log-in and to enter an assessment on the portal, while 84 percent found the portal easy to navigate.

Since launch, data collected on processing times for applications and assessments has shown clear improvements. Internal survey results show that 86 percent of programme team users thought the GMT platform helped filter out ineligible applications and 77 percent found the online assessment section easy to use, while 71 percent valued having all of the documentation in one place.



“

We faced some cultural resistance to start with which required us to communicate the benefits of moving these processes over to an online system. Thankfully our satisfaction surveys – aimed at identifying ease of use for applicants, staff and external assessors – reveal we’ve now got it right.”

Mike Hatt, GMT Senior Project Manager

The GMT has also helped meet compliance demands such as those under GDPR in the UK and Europe as well as other data protection regulations worldwide, as Karen Moses, Project Manager for the Newton Researcher Links Programme, explains: “Sharing Newton Fund applications with external assessors is required as part of the application quality assessment process. Each external assessor is registered internally in the first instance to enable them to fully register on GMT in order to gain access only to the applications which have been assigned to them. Once they have assessed each application it workflows out of their GMT account and is no longer visible or accessible to them, ensuring compliance with GDPR.” Housing the sensitive personally identifiable information (PII) associated with applications in the secure environment of the GMT has therefore provided compliance benefits.

“

Our users indicated that in the post award stages of a grant, scholarship or mobility placement they needed to be able to manage tasks on a large scale (in bulk) rather than individually actioning tasks. We are currently developing a new feature on GMT with Equiniti Toplevel which will do just that, enabling each programme team to action steps/tasks in the workflow on the system for multiple awardees in one go. The new functionality promises to reduce the staff time dedicated to managing cases on the system still further.”

Mike Hatt, GMT Senior Project Manager



Fine tuning

The British Council has recently concentrated on finely tuning the onboarding process to make it easier to bring programmes onto the platform. It uses the Outreach Open Design Studio, a suite of configurable browser-based tools to configure individual assets such as forms, screens, workflow and document templates. Using these tools to rapidly configure programmes has proven highly versatile, allowing qualification criteria to be changed. Programmes are now asked to consider whether their application form is in a compatible format, the number of stages of assessment required, whether eligibility checks are in place, if external assessors or a review panel are required, and the monitoring and evaluation steps they wish to take in order to make onboarding quicker and smoother.

Looking to the future, the British Council plans to continue to look for new ways to use the system to create yet more efficiency. In response to staff feedback it intends to introduce bulk workflows for processes such as email generation. Using multiple filters, this would allow the system to send out requests, receive reports and update applicant records automatically. Such innovative approaches will see the GMT continue to further reduce staff processing times and increase productivity.



Key Results

- Single centralised platform that enables applicants, assessors and staff to access applications and assessments securely
- Global role-based access available 24/7
- Cost savings from sharing a single solution between programme teams
- Productivity gains from automating workflow functions such as eligibility screening, email notifications and monitoring and evaluation
- Integration with online payment processing has reduced invoice generation
- Used by 12 programmes and awarded over 500 grants and 9,500 scholarships and placements to date



EQUINITI
TOPLEVEL